EFFECTIVE PERFORMANCE DISCUSSIONS
REVIEWER CHECKLIST

BEFORE

SCHEDULE
☐ Confirm dates/times for all staff discussions
☐ Secure a private, interruption-free location
☐ Allow for 45-60 minutes minimum

COMMUNICATE
☐ Notify individuals two weeks before
☐ Provide date, time and location
☐ Share a brief agenda to clarify expectations
☐ Set a due date for when you need to receive the employee’s draft Goal Agreement and the review form that includes the employee self-assessment
☐ Encourage the employee to prepare by using the Employee Checklist
☐ You may choose to provide the written review in advance to avoid the discussion time being dominated by the employee reading the review

PREPARE
☐ Create an outline
☐ Review last year’s performance review and job description
☐ Finalize your input on the employee’s draft Goal Agreement
☐ Prioritize critical discussion points for each section of the review
☐ Reference specific examples to illustrate points
☐ Talk with your supervisor and/or your HR Representative if you anticipate problems or need coaching

DURING

SET THE TONE
☐ Create a positive atmosphere in which open and honest discussion is welcome
☐ Review the purpose of the meeting and ask the employee if other topics should be included

LISTEN
☐ Encourage the employee to participate by asking open ended questions; avoid dominating the conversation
☐ Invite the employee to ask questions, raise issues or concerns and give you feedback
☐ Paraphrase and summarize what you hear

LOOK BACK
☐ 25-35% of discussion should focus on the past
☐ Review overall rating, achievement of goals, and assessment of performance against key factors
☐ Recognize significant accomplishments and contributions

COACH
☐ Provide meaningful recommendations
☐ Phrase feedback constructively

LOOK AHEAD
☐ 65-75% of discussion should focus on the year ahead
☐ Discuss goals and Professional Development Plan
☐ Clearly state expectations for each performance factor
☐ Close by asking for feedback on what you can do differently to support the employee

AFTER

DOCUMENT
☐ Note the employee’s feedback about your performance/support
☐ Track your commitments and follow through on agreements

FOLLOW UP
☐ Establish quarterly or mid-year checkpoints and schedule them immediately after the discussion
☐ Revisit established goals and development areas on a regular basis both formally and informally
☐ Provide timely feedback. Deliver praise and constructive feedback in the moment

ASK
☐ Check in with the employee periodically, ask them to track their goal progress and engage them in taking initiative to seek feedback
☐ Regularly encourage feedback from the employee about how you can provide support

ACT
☐ Recognize and reward successes—big and small (in public or privately, depending on employee preference)
☐ If progress on goals and development areas is slow or off track, revisit, revise or counsel the employee immediately—it’s your job
☐ Seek assistance from your supervisor and/or HR Representative if you have performance concerns